18 July 1984

MEMORANDUM FOR: Information Systems Board Members

25X1　FROM: _____ Chairman
Information Services Planning Working Group

SUBJECT: Planning Guidelines

Attached for your review are the planning guidelines that Mr. Briggs asked
the Information Services Planning Working Group to prepare. The guidelines
will be discussed at the 21 August meeting of the Information Systems Board.

25X1

Attachment:
As stated

STAT

Larry's replacement
Oct/Nov time frame

Under consideration
ORIS
REGS
Classification Guide
Expert Systems
Long term replacement 25X1

MEMO IS UNCLASSIFIED WHEN
SEPARATED FROM ATTACHMENT

INFORMATION SYSTEMS BOARD

Guidance for Directorate Information Systems Strategic Plans

Background

The 1984 Addendum to the Agency Long Range Plan, 1982-1992 (dated 5 April 1984) assigned the following planning responsibility to the directorates:

> "Each directorate will prepare by November 1984 a long-range information handling plan using guidelines to be issued by the Information Systems Board in July. The plan should include a statement of ADP goals as they relate to specific Directorate missions and descriptions of any additional tools, techniques, training, and support needed to attain those goals."

This memorandum transmits planning guidance, approved by the Executive Director and the Information Systems Board (ISB) for use by directorate planners.

The purpose of the directorate plan is to give an overview of the directorate, its environment, and anticipated major information systems projects and activities in the FY 1985-1992 timeframe. All proposed projects and activities that have a cumulative cost of $4 million[1] or greater over the planning period should be addressed. Other less costly activities should be reported if they are of particular Agency-wide or inter-directorate interest.

Directorate plans will be integrated into an Agency-wide information systems plan by the ISB. The ISB will be looking primarily for the following in directorate plans:

o   Responsiveness to the Agency Long Range Plan and Executive Director/ ISB guidance.

o   Evidence of interdirectorate coordination, where applicable.

o   Overlap and/or duplication among directorate programs.

o   Gaps within the Agency program as a whole, or in individual directorate programs.

_____

[1]All cost estimates requested by these guidelines should be given in current dollars.

The directorate plan should be no more than 20 double-spaced pages. Component plans or other attachments may be included as supplemental material. The format and general content of the plan are described later in these guidelines.

Definition

For the purposes of this planning effort, information systems are defined as automatic data processing, office automation, and communications equipment (including the overseas and domestic communications networks) that move, manipulate, or otherwise process data and/or text in electronic form. Exclude special purpose[2] systems, and those systems for which resources are not included in the CIA Program.

Substantive Guidance

The attachment contains the "Information Handling Goal" taken from the 1984 Addendum to the Agency Long Range Plan and the Executive Director's "Perspectives and Guidance on 1986" memorandum. The 1984 Addendum states the Agency information handling goal as follows:

"To integrate the tools and concepts of automated information handling into all major Agency activities by the early 1990s."

Directorate plans should reflect the priorities established in the above two documents.

The following information also may be helpful in formulating directorate plans:

o The Agency Long Range Plan provides information and assumptions about the Agency environment.

o Central service plans from ODP, OC, ORD, and ISSG.

o Planners should realize that resource growth over the planning period is expected to be highly constrained. Proposed activities calling for resources beyond previously approved levels will face particularly keen competition.

o The National Bureau of Standards publication "Future Information Processing Technology-1983," Kay and Powell editors (attached), provides useful information on technology trends.

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[2]Special purpose as used herein describes custom-made ADP systems and commercially available ADP systems modified such that they can be used only as an integral part of a non-ADP system or they no longer can be used to process a variety of problems.

Structure of the Directorate Information Systems Strategic Plan

Directorate plans should have the following structure:

o   Executive Summary

    -- Four pages maximum.

o   Goals

    -- Directorate information systems goals should be provided.

    -- Goals should be non-quantitative and general.

    -- Relate goals to Agency guidance (see above).

o   Assumptions and Constraints

    -- Provide assumptions and constraints that relate to the directorate.

o   Current Information Systems Environment

    -- Describe the current information systems environment
        (capabilities, systems, personnel, projects, and activities).

    -- Identify shortfalls and problems.

o   Objectives

    -- State directorate information systems objectives.

        -- Objectives derive from goals (linkage should be explicit).

        -- Objectives should be quantitative, if at all possible, and
            measurable; for example, "Provide 80 percent of the
            directorate with terminals connected to the ODP Central
            Service by FY 1990."

        -- Relate objectives to shortfalls in the current IS
            environment.

o   Projects and Activities

    -- Describe all significant projects and activities (including those
        costing $4 million or more) scheduled for the planning period.

    -- Cover the "Planning Topics" listed in the attachment. Each has
        inter-directorate or Agency-wide implications, so you should
        describe any activities related to those topics.

-- For each project or activity provide:

    -- Cost estimates over the planning period.

    -- Start date and budget year the initiative will appear if it is new.

    -- Date of initial operational capability (IOC) and full operational capability (FOC).

-- Discuss risks and actions to mitigate risk, technical and/or programmatic.

o   Key Issue and Problems

-- Summarize key issues and problems stemming from projects and activities.

-- Discuss actions being taken to overcome problems.

Attachment

Planning Topics

The following topics should be addressed in directorate plans where appropriate. The purpose of this list is to ensure that all directorate activities of ISB interest are described. Other topics should be addressed if they meet the $4 million cost threshold or are of inter-directorate or Agency-wide significance.

o   General directorate information systems architecture

   -- Describe the overall directorate information systems architecture, and state its relationship to ODP and OC central facilities.

o   Automation of the Intelligence Process

   -- Describe directorate efforts to automate major intelligence activities (including SAFE, ALLSTAR, and the NPIC Upgrade).

o   Overseas/Field Automation

   -- Describe any programs for automating non-Headquarters activities (such as CRAFT, FBIS modernization, and OC recapitalization).

o   Office Automation

   -- Describe directorate office automation activities, including the use of word processors and electronic mail.

o   Headquarters Communications

   -- Describe the use of all OC capabilities and facilities. In particular, identify any Headquarters communications requirements that will not be met by current or projected OC capabilities.

o   Artificial Intelligence

   -- Identify proposed uses of artificial intelligence techniques and any equipment or support that will be required.

o   Supercomputers

   -- Identify any requirements for supercomputers and describe how the directorate proposes to satisfy them.

o   Mass Storage

   -- Identify any unique requirements for mass storage and how the directorate proposes to satisfy them.

o   Training

    -- OTE is the lead component in <u>user</u> ADP training.

    -- Identify projected shortfalls in training and describe approaches
       to overcoming them.

o   Disaster/Contingency Planning

    -- Describe directorate plans to deal with local contingencies.

o   Security

    -- ISSG/OS is the lead component for computer security. OC/CSD is
       the lead component for communications security.

    -- Describe any special directorate steps planned to upgrade
       information systems security.

o   Records Management

    -- Describe directorate plans to incorporate approved records
       management practices into existing and proposed information
       systems.

o   Alternate Technologies

    -- Identify any planned activities to evaluate or assimilate
       technologies other than those provided by central services.

CONFIDENTIAL

POSITION DESCRIPTION

1. POSITION TITLE	2. GRADE
Planning Officer	GS-14

3. ORGANIZATION	4. POSITION NUMBER
OIS/P&MS	HL 200

5. CERTIFICATIONS

THIS IS AN ACCURATE DESCRIPTION OF THE DUTIES AND RESPONSIBILITIES OF MY POSITION.

21 May 1984
DATE

I CERTIFY THIS TO BE A COMPLETE STATEMENT OF THE MAJOR DUTIES AND RESPONSIBILITIES OF THIS POSITION NECESSARY TO ACCOMPLISH GOVERNMENT FUNCTIONS FOR WHICH I AM RESPONSIBLE. THIS CERTIFICATE IS MADE WITH THE KNOWLEDGE THAT THIS INFORMATION IS TO BE USED FOR PURPOSES RELATING TO EXPENDITURE OF PUBLIC FUNDS.

5/21/84
DATE

6.

Provide a description of the position involved with the estimated percentage of time spent on each set of duties. If the position is that of a Supervisor also include in the description the number and classification levels of employees directly supervised. Also, describe the following factors as they relate to the position: (1) Knowledge Required, (2) Supervisory Controls, (3) Guidelines, (4) Complexity, (5) Scope and Effect, (6) Personal Contacts, (7) Purpose of Contacts, (8) Physical Demands, (9) Work Environment.

(Begin Narrative)

SUMMARY

Serves as the Planning Officer for the Office of Information Services (OIS) and is responsible for developing long-range (three to ten years) projections and strategies needed to guide the Director of Information Services in the management of OIS programs. Planning is for the purpose of ensuring that Office-directed programs are effective over time and serves as the basis for developing the framework to manage new requirements as they evolve. The Planning Officer position is one of five in the OIS Plans and Management Staff (P&MS); the Planning Officer reports directly to Chief, P&MS.

I. MAJOR DUTIES

50% 1. Studies, assesses, and recommends strategies to handle the problems or shortfalls revealed through incumbent's long-range projections or conceptualizations of Agency needs in the fields of records and information management and document and information security.

35% 2. Researches and analyzes technical and managerial trends in information handling and their potential impact on future resource needs, work roles, organizational structure, existing OIS programs and activities, other Government agencies, and the private sector as a basis for developing projections of future Agency needs.

15% 3. Serves on panels and committees concerned with planning information handling programs.

FORM **387** OBSOLETE PREVIOUS
10-78   EDITIONS

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